Kennedy & Company

NARROWING THE GAPS IN LOUISIANA'S
ADULT LEARNER
AND TRANSFER MARKET:
Policy, Landscape, and Areas of Best Practice
Fall 2015

Agenda Louisiana Presentation

- I. Louisiana's Educational Attainment Rate and Labor Market Demand
- II. Size and Success Rates for Adult Learner Population
- III. Adult Learners and the Link with 2-Year Transfer Rates
- IV. Initial Thoughts: Strategies for Success with Adult Learners & Transfers

EXECUTIVE SUMMARY

- Educational attainment **rates in Louisiana still lag southern peers** and national averages.
- Louisiana has a significant latent adult learner market.
- Approximately **60 percent of the nearly 260,000 added jobs in the state of Louisiana will require education beyond a high school diploma** by 2022. The "Bright Outlook" jobs are more likely to require post-secondary degrees.
- Retention and success rates for 2-year transfers to 4-year institutions remain low across the U.S. and pose a challenge to adding 4-year degrees.
- Barriers of entry for adult learners include a lack of time to pursue higher education; a duty to familial and life responsibilities; the availability and scheduling of course time and place; and the cost of education. As many adult learners consider themselves employees first and students second, the most successful programs offer flexibility and credit for prior learning in order to better attract and retain adult learners.
- States that are successful in mobilizing their adult learner population are those which streamline the transfer process, which includes leveraging credit for prior learning and employing **student-friendly student services operations**.

I. Louisiana's Educational Attainment Rates and Labor Market Demand

Why are Adult Learners Important to Educational Attainment Rates?

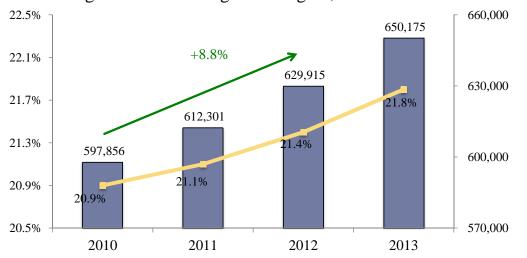
Louisiana's Degree Attainment Level Edges Upward

Current State of Affairs

Louisiana has observed steady growth in the number of adults holding at least a bachelor's degree. Between 2010 and 2013, the adult population in Louisiana holding a bachelor's degree or higher increased 8.8 percent, from 598,000 adults ages 25 and older in 2010 to over 650,000 in 2013. However, nearly three in four adults in the state of Louisiana (73 percent) do not have a postsecondary credential. What's more, more than one in five adults (21 percent) have college experience, but no degree.

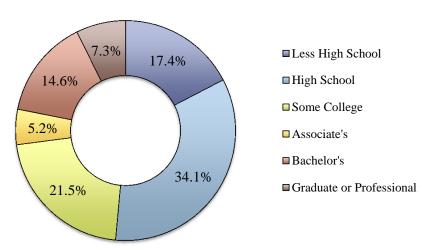
It is important to note that a larger *percentage* of adults in the state of Louisiana hold a bachelor's degree or higher, from 20.9 percent of adults ages 25 and older in 2010 to 21.8 percent in 2013. This one percent increase is comparable to southern state and national averages, which are discussed on the following slide.

Population and Percentage of Louisiana Adults Holding a Bachelor's Degree or Higher, 2010-2013



Educational Attainment Among Louisiana Residents

Ages 25 and Older, 2013

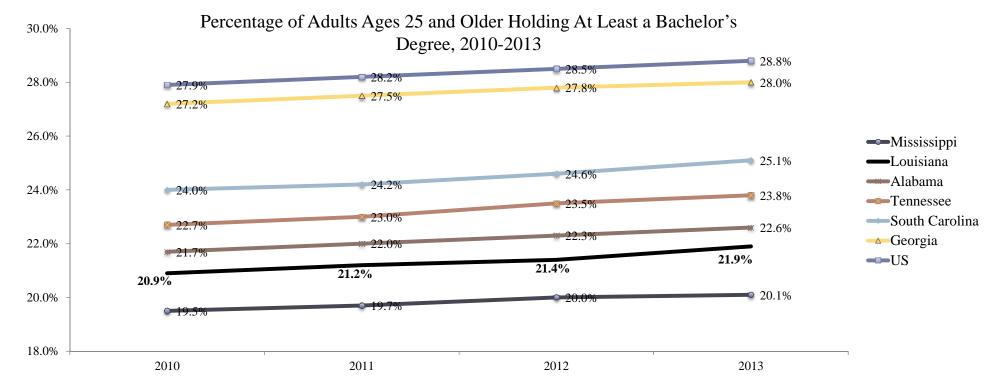


Source: 2009-2013 American Community Survey, Social Characteristics

BUT ATTAINMENT RATES STILL LOW RELATIVE TO US, SOUTH

Bachelor's Degree Attainment in Southern States

The figure below benchmarks the percentage of Louisiana adults holding a bachelor's degree or higher with southern peers. While Louisiana has observed increased educational attainment among its adult population, so have the other southern states examined. Georgia, South Carolina, and Tennessee contain the highest percentage of adults holding at least a bachelor's degree, while Mississippi contains the least. All southern states examined had increased degree-attainment at a comparable range.



Source: 2009-2013 American Community Survey, Social Characteristics

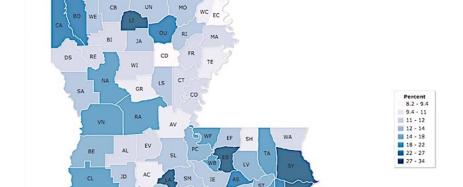
Correlation in LA between Degrees & Income

The Correlation Between Education and Income

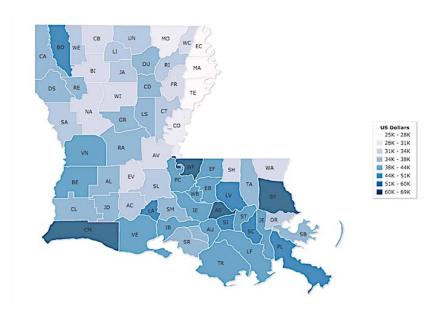
The figure below highlights educational attainment (bachelor's degree or higher) and median household income by parish. Parishes with darker shades highlight areas with a larger percentage of residents holding at least a bachelor's degree and those with higher median household incomes.

Percentage of Residents with Bachelor's Degree or Higher

by Parish, 2013



Median Household Income by Parish, 2013



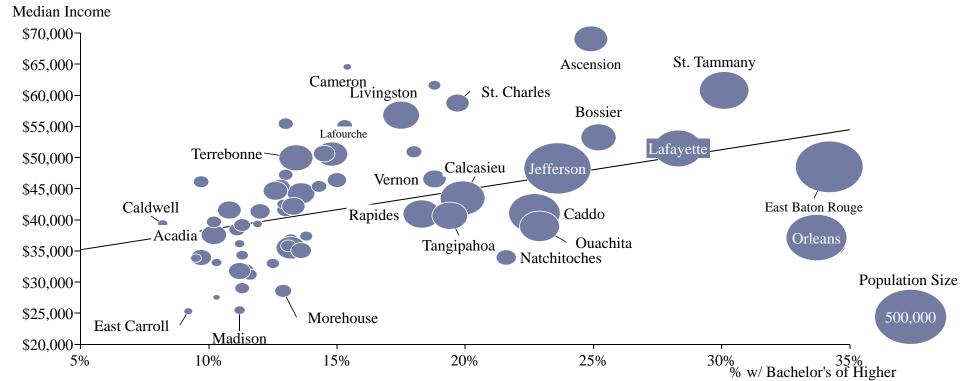
A look at Parishes shows the expected correlations between higher median incomes and degree attainment rates, but with notable outliers (shown on next page).

Source: 2009-2013 American Community Survey data; IndexMundi

Links Between Median Income Bachelor Degrees Shows a Few Outliers

Louisiana's parishes follow the general trend of positive correlation between bachelor's degree attainment and median income (by Parish) but a number of medium-sized parishes (Ascension, St. Tammany, St. Charles, etc.) show median incomes far above the overall state trendline.

Bachelor's Degree Attainment Rates versus Median Income, by Parish, 2009-2013

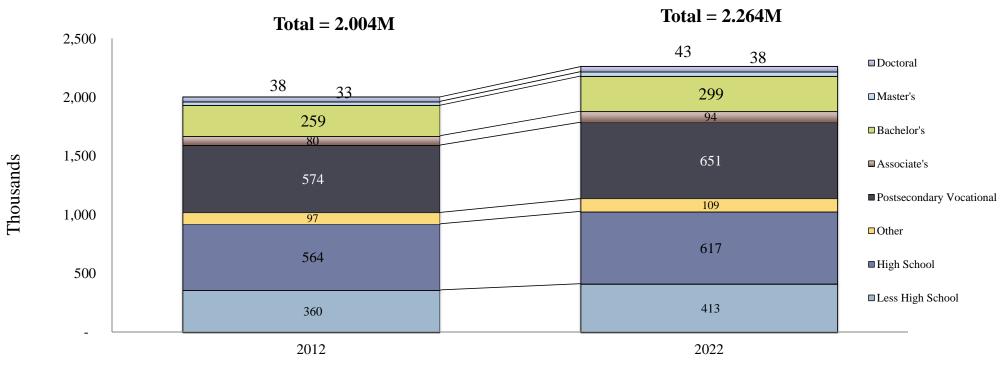


Source: 2009-2013 American Community Survey data; IndexMundi

Trendline: y = 64295x + 31981; $R^2 = 0.1777$

The Louisiana Workforce Commission estimates the state will house nearly 2.3M employees by 2022. Approximately 60 percent of the nearly 260,000 added jobs will require education beyond high school, leading to an increased number of jobs requiring a postsecondary credential. However, only 27 percent of adults in the state of Louisiana currently hold a postsecondary degree

Louisiana Employment Projections by Source of Education, 2012-2022

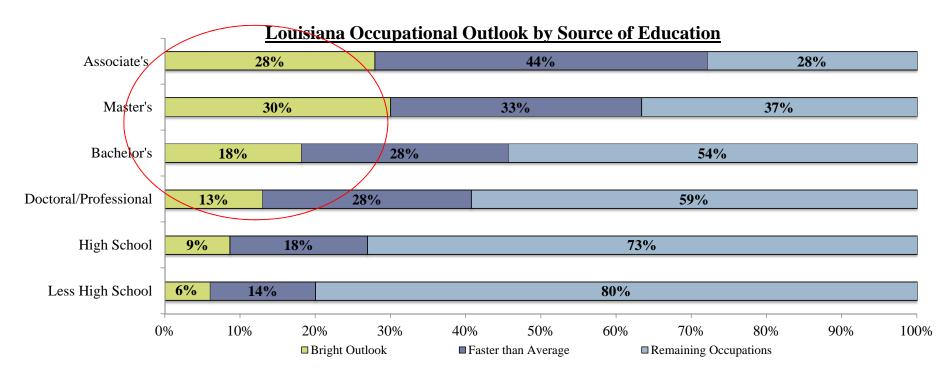


Jobs which require associate's and bachelor's degrees are projected to increase the fastest (18 percent and 15 percent, respectively), while demand for Doctoral and Master's will grow by 14%. Demand for jobs requiring high school diplomas rises 9%.

Source: Occupational Projections by Education, Louisiana Workforce Commission

Degree Attainment Key to "Bright Outlook" Jobs

The majority of occupations in Louisiana requiring a master's and associate's degree – and nearly half of those requiring a baccalaureate degree – are projected to grow faster than the national average (between 15 and 21 percent growth) by 2022.



Fewer than 10% of Louisiana occupations requiring a HS education or less have a "bright outlook" (growth of more than 22% in ten years). Jobs in the state of Louisiana which require a bachelor's degree or higher are more stable and have a brighter outlook than those which require high school or less.

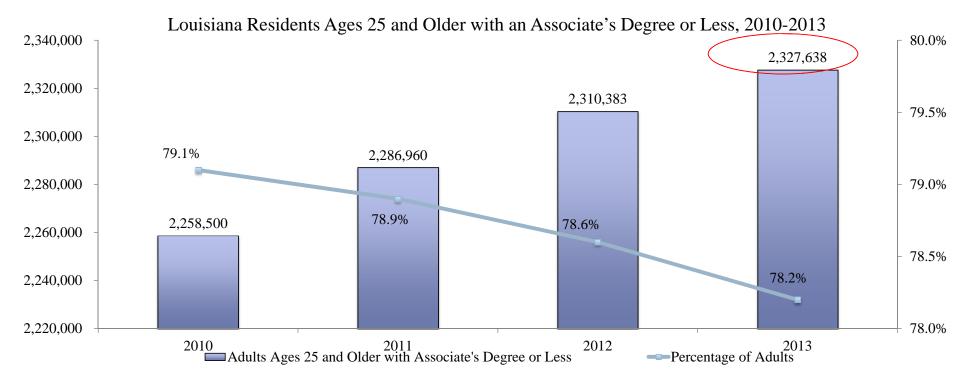
Source: Occupational Projections by Education, Louisiana Workforce Commission

II. Size and Success Rates for Adult Learner Population

What is the Market for Adult Learners in Louisiana? How does it Compare with Other States?

Sizeable Latent Adult Student Population Remains

Although Louisiana's *share* of adults with a bachelor's degree or higher is increasing, the state continues to house a larger *population* of adults with an associate's degree or less

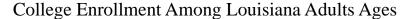


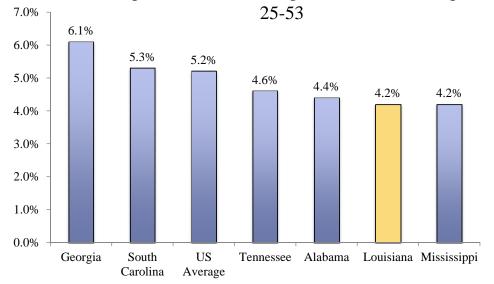
In 2013, 2.3 million adults ages 25 and older in the state of Louisiana held an associate's degree or less – nearly 70,000 more than 2010 levels. As such, Louisiana contains a *significant* latent adult learner market that continues to increase in raw numbers.

Other States Enrolling More Adult Learners

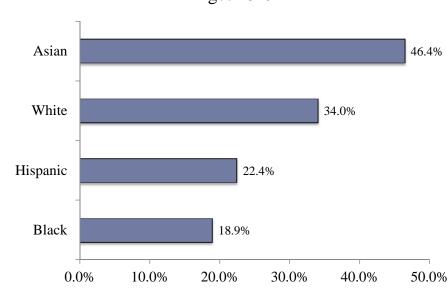
College Enrollment Trends Among Adult Learners

For a relatively large adult learner market, Louisiana has among the lowest college enrollment rates for adult learners. Among the southern states examined, Louisiana was level with Mississippi for having the lowest college-going rates among adults ages 25 to 53 (4.2 percent). In order to increase college enrollment among adults, it is also evident that Louisiana must address its degree attainment disparity by race – only about one in five African-Americans and Hispanics ages 25 to 64 hold a degree in the state of Louisiana, compared to 34 percent of Whites and 46 percent of Asians.





Degree Attainment Rates Among Louisiana Adults Ages 25-64

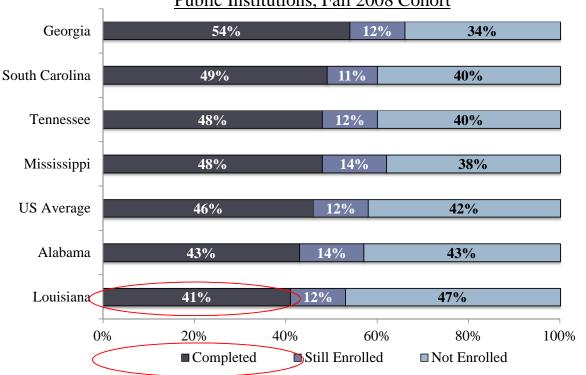


Source: "A Stronger National Through Higher Education," Lumina Foundation

LA Adult Learners Show Lower Completion Rates

More than half of adult learners attending four-year public institutions in the state of Louisiana fail to graduate in six years.

Six-Year Outcomes for Adults Ages 24 and Older Attending Four-Year Public Institutions, Fall 2008 Cohort



When benchmarked with other southern states, Louisiana performed the poorest with regards to the percentage of adults who completed a four-year public degree in six years (41 percent) and adults who dropped out (47 percent).



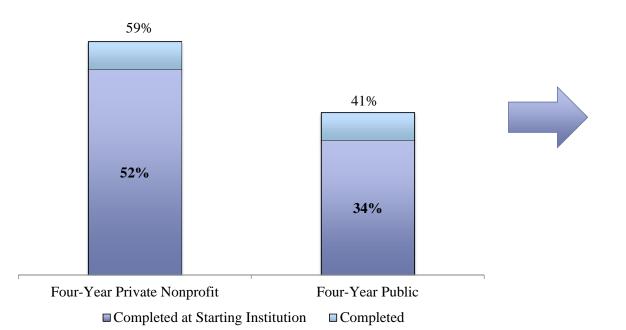
Solutions for narrowing the adult learner gap must also address retention and student success.

Source: Completing College: A State-Level View of Student Attainment Rate, National Student Clearinghouse

LA Private Colleges Showing Greater Adult Learner Success

Louisiana's private colleges showed greater overall success in six-year outcome rates than Louisiana's four-year publics.

Six-Year Outcomes for Louisiana Residents Ages 24 and Older, by Starting Institution and Transfer Institution



A comparison of private versus public adult learner student success strategies would likely prove useful, absent radical differences in incoming adult learner college preparedness rates.

Source: Completing College: A State-Level View of Student Attainment Rate, National Student Clearinghouse

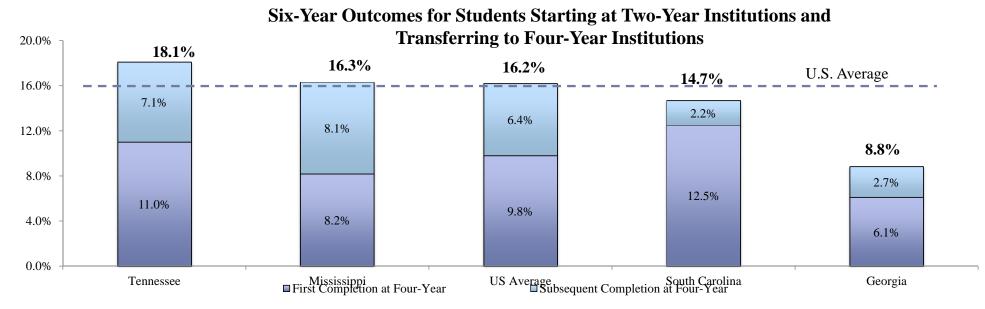
III. ADULT LEARNERS AND THE LINK WITH 2-YEAR TRANSFER RATES

What is the Market for 2-Year Transfers to 4-Year Institutions in Louisiana? How does it Compare with Other States?

What's the Common Thread Between 2-Year Transfers and Adult Learners?

Low 4-Yr Success Rate in South for Two-Year Transfer-Outs

Approximately 16 percent of U.S. students starting at two-year institutions graduate from four-year institutions within six years. Among the southern states examined, South Carolina had a notable percentage of students (12.5 percent) complete their four-year degrees without first obtaining an associate's degree.



Note: **Louisiana** and Alabama were not included in the National Student Clearinghouse's two-year public data due to low coverage (less than 65 percent coverage from Clearinghouse historical data).

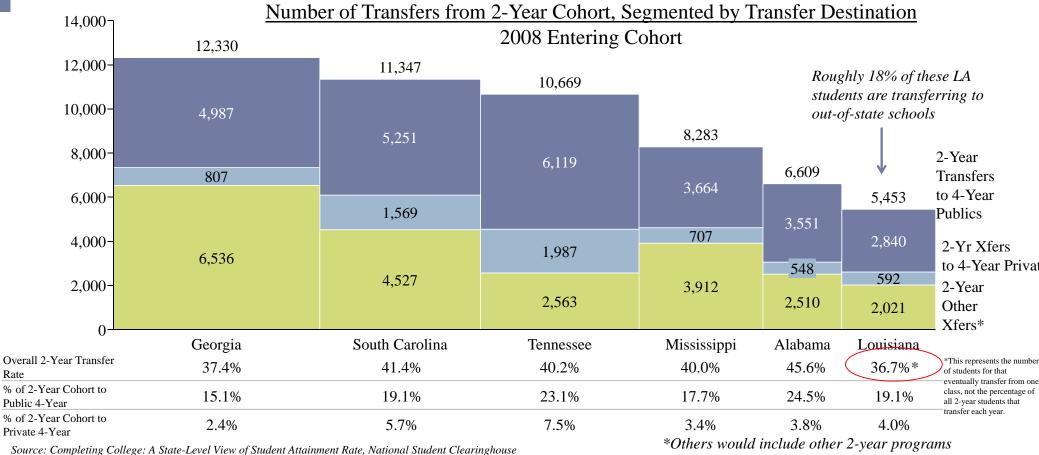
Adult Learner Perspective: Adults over the age of 24 are significantly less likely to persist and ultimately graduate from a four-year institution when starting at a two-year public. In Tennessee, for instance, only 10.5 percent of adults starting at two-year publics end up at four-year institutions, compared to 18 percent of all Tennessee students entering two-year publics.

Source: Completing College: A State-Level View of Student Attainment Rate, National Student Clearinghouse

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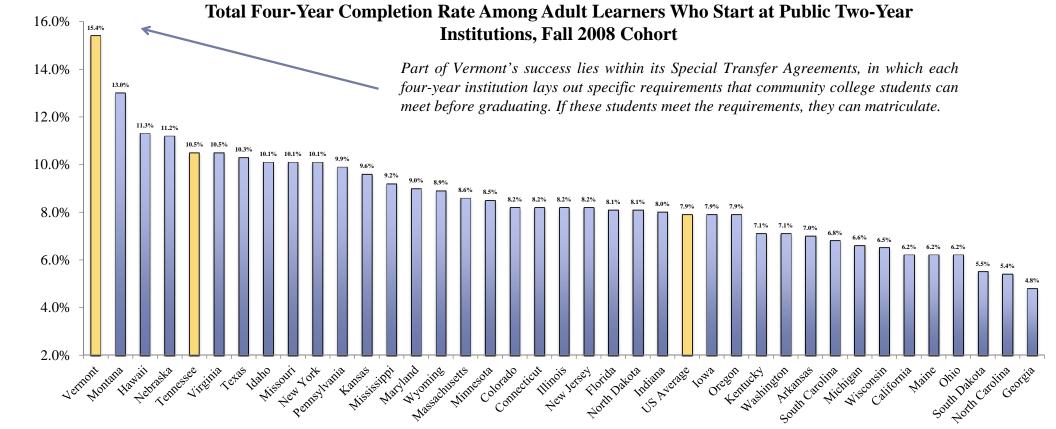
LA: A Smaller 2-Year Transfer Pool & Lower Transfer Rates

Louisiana has a lower overall 2-year transfer rate than most of its southern peers. In addition, the overall size of Louisiana's 2-year cohort (2008-2014 cohort) also contributes to a small pool of transfers.



Adult Learner Completion Rates Average 8%

Approximately eight percent of all adult learners who start at two-year institutions ultimately end up with a bachelor's degree after six years. States with the highest achieving adult learners are Vermont (15 percent), Montana (13 percent), and Hawaii and Nebraska (both 11 percent)



Source: Completing College: A State-Level View of Student Attainment Rate, National Student Clearinghouse

Common Threads: Adult Learners and the 2-Year Transfer Market

- Louisiana shows a smaller 2-year starting cohort (2008 sample) and lower overall transfer rates that comparable southern peers
- Across the south and beyond, rates for 4-year degree completion are fairly low (U.S. average = 16%) for those students that start at a 2-year institution and then transfer to a 4-year institution
- Success rates (% of students obtaining a bachelor's degree) for *adult learners* that start at a 2-year institution and then transfer, are even lower.
- However, some states have shown successes in getting students (traditional 2-year transfers and adult learners) to succeed and earn bachelor's degrees
- Many of the practices and policies needed to attract and graduate Adult Learners will apply to transfers as well.

IV. Initial Thoughts: Strategies for Success with Adult Learners & Transfers

Why Do Adult Learners/Transfers Struggle?

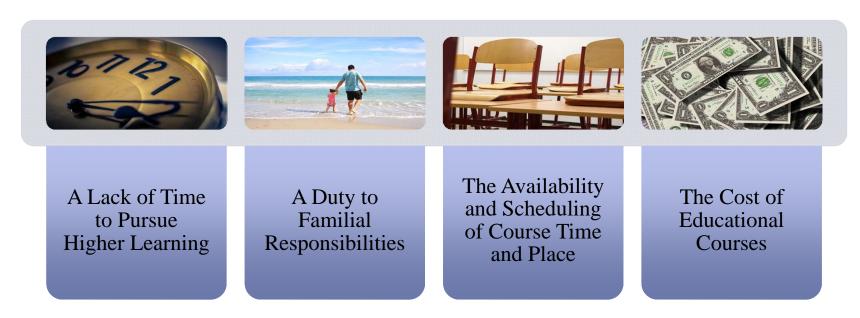
What Unique Needs Do Adults Learners Have?

What are the Components of a Successful Strategy for Narrowing the Educational Attainment Gap with Adult Learners, Transfers?

What Strategies Seem to Work for Others?

Barriers to Entry for Adult Learners

More than half of students over the age of 24 included in the National Postsecondary Student Aid Study indicated that they saw themselves as **employees first and students second**.



Compared to their traditional peers, adult learners more heavily weigh external factors – such as finances, environment, family responsibilities, and ability to transfer – and less heavily weigh academic factors, such as academic advising, attendance, availability of courses, and social interaction.

Unique Learning Needs for Adult Learners

Compared to traditional peers, adult learners are self-directed, bring life experiences to their learning, are goal-oriented and practical, and seek relevant knowledge to their learning.

As such, according to the NTAR Leadership Center, the academic needs of adult learners include:



Flexibility and acceleration that matches their home and work schedules



Applied, hands-on learning in and out of the classroom



Employer
partnerships that
help provide
internship
experience and
career outcomes



A smooth transition from non-credit courses to forcredit courses



Use of technology to customize instruction

Source: U.S. Department of Labor; The NTAR Leadership Center; Association of College and University Presidents

More Detail: What Adult Learners Students Want/Need

To compete effectively for many adult learners, it's important to consider the potential benefits for students and how Louisiana does or does not offer these to this unique population.

The Right Educational Offering

In surveys that Kennedy & Company has conducted at other colleges, when non-traditional students are asked what the college could do to help them meet their educational goals, typical responses include:

- ✓ Offering more classes and course section availability
- ✓ Offering more classes on the weekend and in the evenings
- ✓ Offering more online options for classes and degree programs
- ✓ Improving advising services, especially outside the 9am 5pm window
- ✓ Improving communication efforts
- ✓ Offering more opportunity for financial aid

Positive learning experiences; consistent quality

Smooth Enrollment Process

Beyond this, the enrollment *process* becomes increasingly important to help usher inquiries through to registration and attending courses.

Important aspects of these operations include: Consistent information about offerings across all channels; easy-to-navigate

- ✓ Prospect information is kept and used
- ✓ Fast turnaround for questions
- ✓ Broad range of flexible offerings
- ✓ Seamless communication efforts

High Quality Educational Experience

Finally, ensuring that the online experience provides a quality education that helps to retain students is important for both students and for the university's brand. This means that the ideal online

- learning experience includes: Consistent (online) course content with quality controls
- Consistent experience with the institution's brand
- Call centers/coaches that provide high-touch counseling for students that need it most
- Reduced time to degree, help navigating high DFW classes
- Lower costs because of fewer bottlenecks, faster graduation

Less student debt at graduation

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Components of a Statewide Strategy for Narrowing the Gap

For maximum effect, a state-wide effort to narrow the educational attainment gap, with a focus on adults and transfers as well, must consider: 1) statewide policy, 2) system and institution-specific policy and, 3) the students services operations at each institutions that support enrollment and student success.



Statewide Policy/Regulations

- Mandated Articulation Agreements
- Prior Learning Policy
- Financial Incentives for Students
- Incentives/Disincentives for Institutions



System/Institution Policy

- Credit-Transfer Process & Website
- Admissions Cycles and Timing
- Financial Incentives
- Gen Ed and Major-Specific Curricular Challenges



Student Services Operations

- Initial Recruiting and Intake (hours, channels of communication)
- Financial Aid Estimates and Packaging, for some
- One-Stop Shop: Application, Transcripts, Packaging, Testing, Advising, Registration, Bursar

Imperative to remove hurdles to student enrollment and student success.



The operational details matter, especially when dealing with hard-to-serve students.

Source: Kennedy & Company Experience

The Success of Tennessee Adult Transfers

The Success of Tennessee Adult Transfers

The Tennessee Higher Education Commission (THEC) collaborates with two systems of higher learning – the University of Tennessee System (overseen by the Board of Trustees) and state universities, colleges, and technology centers (governed by the Tennessee Board of Regents). Part of the responsibility of THEC lies in transfer and articulation policies, which have since been the main driver behind its adult transfer success (defined as graduating from a four-year institution). In 2008, Tennessee was one of seven states to be awarded the Making Opportunity Affordable grant – later known as the College Productivity Initiative – to transform and strengthen adult learner transfer and higher education finance. The ideas formed from the grant laid the

pround work for the Complete College Tennessee. After transfer pathways, which established common pre-major courses of study that universities and colleges would recognize and accept in transfer across the vast majority of academic majors at public universities" (Master Plan 2015-2025, p. 7). In conjunction with these efforts was the Drive to 55 initiative, which correspondingly challenged the state of Tennessee to increase its postsecondary educational attainment rate above 55 percent by 2025. Tennessee's robust adult learner success can be attributed to this and other initiatives, which have established, among others:

- ➤ A "reverse articulation and transfer system" which permits students who have earned credit towards an associate degree to be awarded the credential, even if they are currently enrolled in another institution;
- > A policy which grants adult learners and low income students a 40 percent funding "premium" as part of an outcome-based effort;
- The idea that adults with some college but no degree are "sleeping giants," and as such should be targeted through **outcome-based funding formulas**;
- ➤ The Tennessee Reconnect program, in which adult learners can earn a diploma or certificate free of charge from one of the 25+ Tennessee Colleges of Applied Technology (TCATs); and



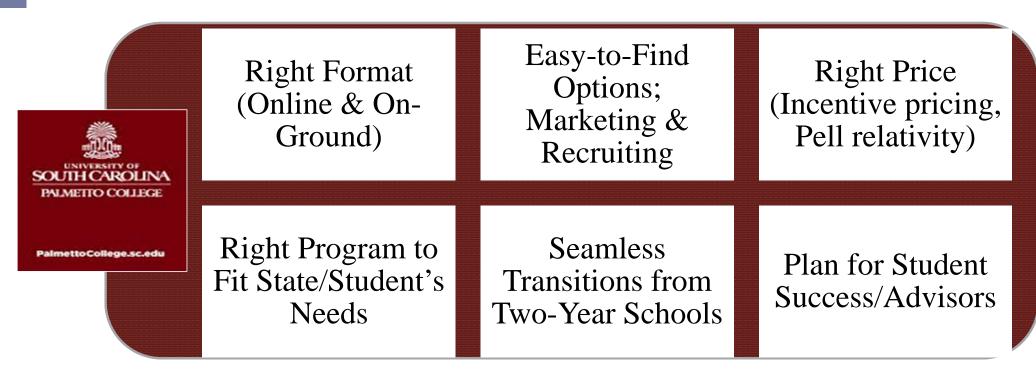
So Outreach efforts at the community and regional levels which address the importance of a

postsecondary degree in the current labor market

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Our Experience: South Carolina

In working with the creation of Palmetto College, the University of South Carolina System's online "college" designed to promote degree completion for adults and 2-year transfers, we focused on a number of strategies designed to maximize enrollment of adult learners and transfers from 2-year institutions.



This offering, from South Carolina's largest system, now enrolls thousands of both 2-year transfers and adult learners.

Source: University of South Carolina Board Minutes February 2012

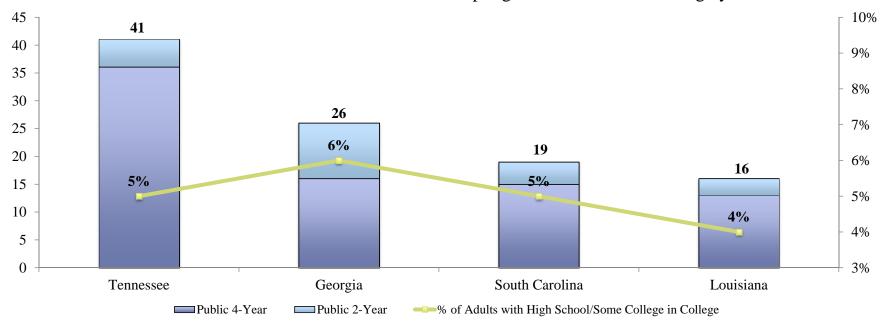
Questions?

APPENDIX

Spread of Prior Learning Assessment Use

States have various policies surrounding the transfer and reengagement of nontraditional and community college students. To target working adults with high school and some college experience, many states and institutions have accepted credit through prior learning experiences. The figure below provides the number of four-year and two-year public institutions accepting credits for prior learning experiences in each high-performing southern state (TN, GA, and SC). Despite nearly three in four public-four year institutions accepting PLA, only one in five public two-years in the state of Louisiana do the same.

Number of Public 4-Year and 2-Year Institutions Accepting Credit for Prior Learning by State, 2012

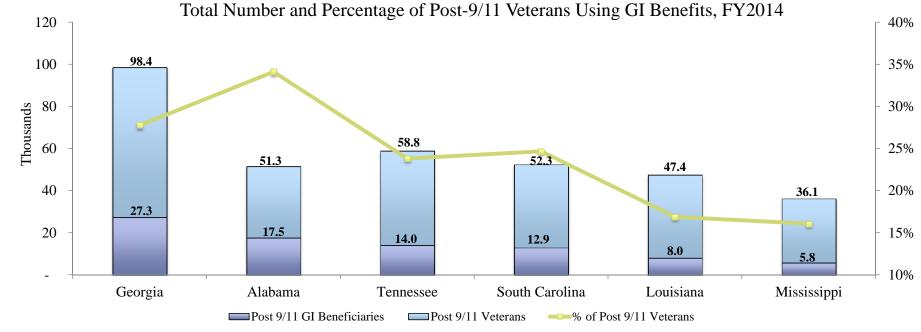


Source: Prior Learning Assessment, Lumina Foundation Strategy Labs

Areas of Inquiry: State and Institutional Policies

Military Veterans

Of the approximate 47,400 Gulf War (Post-9/11) Veterans in the state of Louisiana, only 8,000 (17 percent) chose to leverage the Post-9/11 GI Bill to attend a Louisiana institution. States containing a higher percentage of Post-9/11 GI beneficiaries also house a larger selection of "military friendly" schools (institutions which provide tailored assistance for Veterans; have strong military retention, graduation, and employment rates; and provide generous tuition assistance and course flexibility among others). Alabama, for instance, houses 27 military friendly postsecondary institutions, compared to Louisiana's 14 military friendly schools. To increase attainment among adult learners, Louisiana should consider expanding outreach to veterans both on-campus and in-state, providing information on how they can transition to and pay for postsecondary education (considering that both of these factors frequently dissuade veterans from pursuing higher learning).



Case Study: USG's Adult Learning Consortium

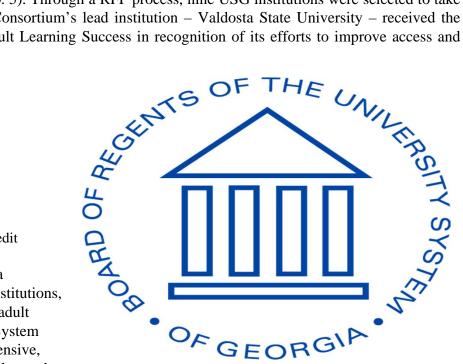
USG's Adult Learning Consortium

In 2008, the University System of Georgia launched the Adult Learning Consortium with the aspiration "to increase the number of low-income adults with some college credit but no degree" (Adult College Completion Network, p. 5). Through a RFP process, nine USG institutions were selected to take part in the consortium, in which now there are thirteen. More recently, the Consortium's lead institution – Valdosta State University – received the National CAEL (Council for Adult and Experiential Learning) Award for Adult Learning Success in recognition of its efforts to improve access and completion among its adult learners.

The Consortium has since been involved in a number of tasks, including:

- Conducting surveys on adult learner/faculty perceptions;
- > Establishing an Adult Learning Committee as central point of contact;
- > Developing a Prior Learning Assessment network and professional development resource for instructors;
- > Forming online degrees, such as an online Bachelor of Science in Organizational Leadership;
- > Marketing to adult learners in the military; and
- > Implementing public awareness campaigns to recruit adult learners with college credit but no degree.

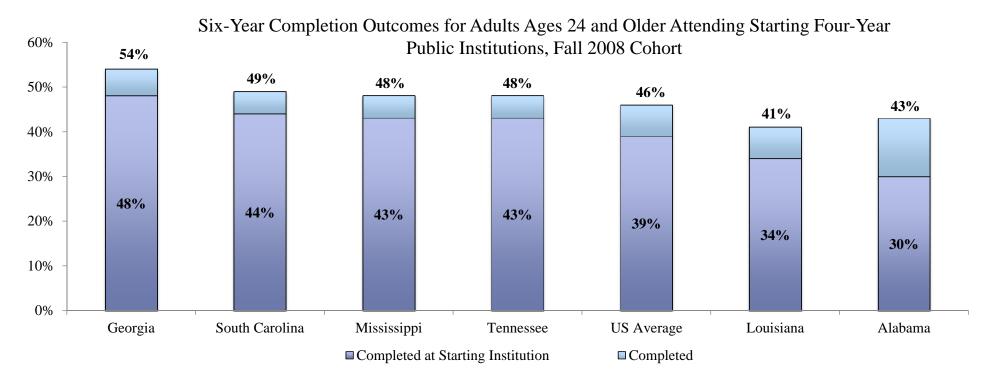
The Adult College Completion Network posits that adult enrollments in Georgia "increased significantly since the program began." Compared to non-member institutions, those participating in the Consortium saw an approximate 5 percent increase in adult enrollment (compared to 1 percent increase in non-members). If the Louisiana System were to implement PLA or increase marketing/outreach to Veterans, a comprehensive, centralized agenda and strong organizational structure focused on a singular goal must be followed in order to maximize adult learner enrollment. As such, it is also recommended that once the System finds a tactic – or set of tactics – to pursue, it tracks adult enrollment and performs outcomes measures to benchmark its performance.



Source: Adult College Completion Network; Georgia Opportunities for Adult Learners

One in Three Adult Students Finishing At 1st Institution

Only one in three adult learners attending a four-year public institution in the state of Louisiana completed their degree at the same institution after six years. When benchmarked with other southern states, Louisiana ranks among the poorest in retaining adult learners, while South Carolina, Mississippi, and Tennessee rank among the best (all have five percent disparity between percentage of adult completers and those that completed their degrees at their starting institutions).

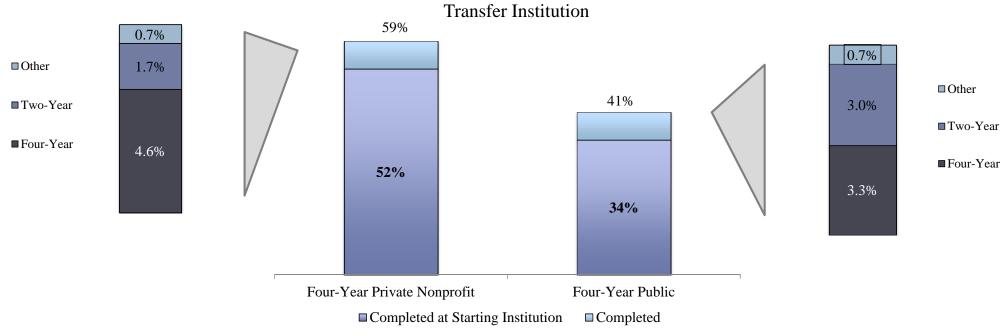


Adult Learner (Re)Engagement

Adult Learner Transfer

Adult learners in Louisiana transferring from four-year public institutions were slightly more likely to complete their degrees at another four-year institution (3.3 percent of 2008 fall cohort) than at a two-year institution (3.0 percent). Despite containing the same transfer rate as four-year public learners, those in the fall 2008 cohort that initially enrolled at a four-year private nonprofit were much more likely to attend another four-year institution (4.6 percent) than a two-year institution (1.7 percent). Most notably, however, is that adult learners transferring from four-year institutions typically complete their degrees at another four-year institution.

Six-Year Outcomes for Louisiana Residents Ages 24 and Older, by Starting Institution and



Source: Completing College: A State-Level View of Student Attainment Rate, National Student Clearinghouse

Transfer and Non-Traditional Student Initiatives

Adult Learner Transfer

States have various policies surrounding the transfer of nontraditional and community college students.

State	Oversight	Guaranteed Associate Transfer to Four-Year Institution	Assessment Credits
Alabama	Articulation and General Studies Committee	Using the Statewide Transfer and Articulation System (STARS), students are guaranteed transferrable credit from a two-year institution to a four-year institution.	Although not universal, the Alabama Community College System awards credit through "nontraditional means," such as credit through Prior Learning Assessment.
Georgia	University of Georgia System Board of Regents	All associate's degrees can be leveraged to obtain a baccalaureate degree. However, each institution has its own assessments.	University of Georgia and the Technical College System are working together to increase number of institutions accepting Prior Learning and other credentials.
Louisiana	Statewide Articulation and Transfer Council	Yes. The Transfer Degree Guarantee ensures students an easy transfer to a four-year institution. The Louisiana Transfers associate degree grants 60 hours of transferrable credit.	Act 356 allows the development of a uniform policy surrounding credits earned through Advanced Placement (AP) and International Baccalaureate (IB) exams
Mississippi	Mississippi Institutions of Higher Learning and Community Colleges Board	Agreement between Institutions of Higher Learning and Community Colleges Board grants 60-hour program transfer between community colleges and university system.	Currently, there is no identifiable system in place that grants statewide credit through traditional or nontraditional assessment.
South Carolina	South Carolina Commission on Higher Education	The Transfer Policy for Public Two-Year and Four-Year Institutions in South Carolina grants junior-status to those graduating from programs containing Transfer Blocks.	Public institutions grant credit for strong Advanced Placement and International Baccalaureate scores.
Tennessee	Tennessee Higher Education Commission	Legislation affirms that all students graduating with an associate's meet the prerequisites to transfer to university system	Credits based on Prior Learning Assessments at another Regent-affiliated institution can be transferrable at public universities.

Source: Transfer and Articulation – State Profiles, Education Commission of the States